Maryland Campaign Reporting Information System
(MD CRIS)

Committee Training Manual

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1.0 Overview

The Maryland Campaign Reporting Information System (MD CRIS) is divided into three modules based on the type of system user. The three modules are: Public Module, Committee Module, and Administrator Module. This manual focuses on the Committee Module. This is the portion of the system that committees registered with the Maryland State Board of Elections (SBE) will be using to disclose financial transactions, file campaign finance statements, and communicate with SBE.

A Committee Super User has the following menu options:
- View/Edit Registration Information
- Enter Contributions/Transfers/In-Kind Contributions
- Enter Expenditures and Outstanding Obligations
- Enter Non-Candidate Loans
- Enter Loan Payments
- Enter Return Contributions
- Enter Outstanding Obligations Paid
- Edit / File Pending Transactions
- Amend Transactions
- Upload Transactions
- Maintain Users
- Change Password

A Committee Data Entry user has access to all the above menu options except the following:
- View / Edit Registration Information
- "File All to State" and "File Final Report" buttons on Edit / File Pending Transactions screen
- Amend Transactions

Additional role permissions can be added and modified by a Super User as needed.

2.0   Committee Login
This screen allows a valid Committee user to login into the Maryland Campaign Reporting Information System.

The Committee login process entails the following overall steps:
- Open your web browser and enter the Maryland Campaign Reporting Information System address in the address bar: https://campaignfinance.md.gov

- The Maryland Campaign Reporting and Management System Home Page will be displayed.

Figure 2.0: Home Page

- Enter your Username and Password and click the "Login" button.
- If you enter an incorrect Username and/or Password, you will receive a prompt stating "Your login attempt was not successful. Please try again." To try again, click "OK."
  Warning: After three unsuccessful attempts to login, your account will be locked for 15 minutes.
- After logging in successfully, the Reminders screen will appear.

3.0 Forgot Password
This screen allows a valid Committee user to retrieve a forgotten password.

The Forgot Password process entails the following overall steps:
- If you do not remember your password to login into Maryland Campaign Reporting Information System, click the "Forgot Password" link on the Home Page.
- The "Forgot Password" page will be displayed.

Figure 3.0: Forgot Password

Forgot Password

Forgot Password
Username* [   ]
Submit   Cancel
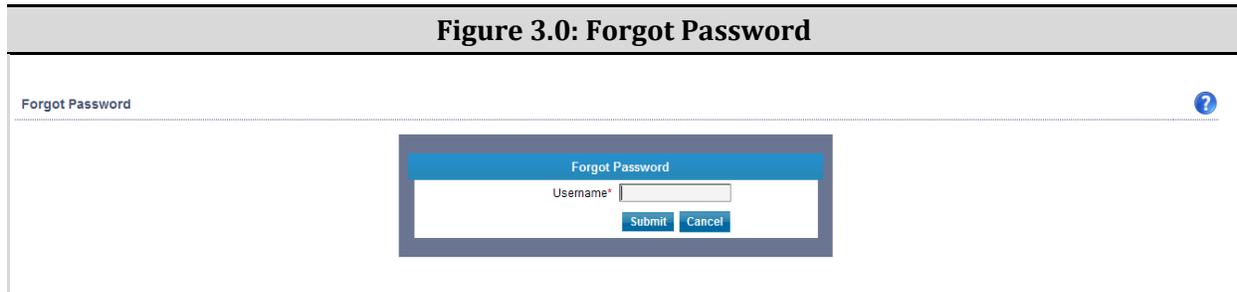
- Enter the "Username" that you use for logging into Maryland Campaign Reporting Information System.
- Enter the email of the Candidate or Committee you are trying to login as and click "Submit."
- You will receive an email with a reset (new) password.
- Click "Cancel" in the dialogue box to be returned to the Home Page without requesting a new password.

4.0   Reminders

This screen displays messages from the State Board of Elections, reminders about upcoming reporting deadlines and any pending verifications required.

The Reminders process entails the following overall steps:
- After successfully logging into the Maryland CRIS, the Reminders screen appears.
- You can access the Reminders screen also by clicking on the Reminders menu (on top right of the screen) anytime.

Figure 4.0: Reminders

Reminders		Vishal Hanjan (Committee to Elect Vishal Hanjan)
Message from Administrator		
Upcoming Filing Period Due Dates		
03/18/2012 Pre-primary Presidential		03/23/2012

	Tasks	Count
+	My Verifications	0
+	Pending Verifications for this Committee	0

- Your Name and the Committee Name are displayed on the top right of the screen.
- To view the left side menu, click the ▶ (expand arrow) on the left side of the screen and to collapse the left side menu, click the ◀ (collapse arrow).

Tip: *Anytime you need help with the screen that you are currently on, click the ❓ (question mark) on the top right corner of the screen.*

5.0 View/Edit Registration Information
This screen allows you to view and/or edit your Committee's Registration Information.

5.1 View Registration
- Login to Maryland CRIS with a valid username and password.
- Once logged in as a valid user, click on the "View/Edit Registration" link on the left side of the screen.
- The registration information for the logged-in Committee will be displayed.

Figure 5.1: VIEW/EDIT REGISTRATION INFORMATION

View / Edit Candidate Committee Registration   Vishal Hanjan (Committee to Elect Vishal Hanjan)

Committee Information

Committee Name* Committee to Elect Vishal Hanjan
(Must include candidate's last name)   CCF ID: 01000001

Election Participation

Election Type* -- Select Election --   Election Year* --Select Election Year--   Participation Frequency* --Select--

Office Sought Information (Optional)

Office Type --Select Office Type--   Office Sought --Select Office--   Jurisdiction --Select Jurisdiction--

Party Affiliation -- Select Party --

Save Election   Cancel

Election Type	Office Type	Office Sought	Jurisdiction	Party Affiliation	Election Year	Participation Frequency	Start Date	End Date	Action
Presidential	Federal Office	President	Federal	Democratic	2012	Recurring	11/04/2011		

Candidate Information

Name	Date of Birth	Email	Mailing Address	Public Phone	Edit
Vishal Hanjan	01/14/1981	vishal.hanjan@pcctg.com	123 Main St., Annapolis, MD, 21345	555-555-5555	

Chairperson Information ☑ Same as Candidate

Name	Date of Birth	Email	Mailing Address	Public Phone	Start Date	End Date	Actions
Vishal Hanjan	01/14/1981	vishal.hanjan@pcctg.com	123 Main St., Annapolis, MD, 21345	555-555-5555	11/04/2011		

Treasurer Information

Name	Date of Birth	Email	Mailing Address	Public Phone	Start Date	End Date	Actions
Tom Bryers	07/03/1950	tom.bryers@pcctg.com	123 Main St., Annapolis, MD, 21345	555-555-5555	11/04/2011		

Additional Contacts (Optional)

Add New Contact

Role	Name	Mailing Address	Public Phone	Contact Phone	Email	Start Date	End Date	Receive Notices	For Public	Actions
				No records to view.						

Slate Information

Slate Name	Slate Chairperson	Submitted Date	Candidate Verified	End Date	Delete
		No records to view.			

Depository Information

Add New Depository

Name of Financial Institution	Address	Account Type	Account Number	Start Date	End Date	Actions
B o A	1 Main St., Annapolis, MD, 21345	Checking	1234567890	11/07/2011		

Filing Information

Election Cycle	Filing Period Name	Filing Method	Report Due Date	Filed Date
2011-2014	2012 Annual	Original Campaign Statement	01/18/2012	11/08/2011

Violations

Filing Period Name	Report Due Date	Filed Date	Violation Status	Violation Date	Outstanding Balance	Violation
2012 Annual	01/18/2012	11/08/2011			$0.00	Discrepancy in Cash Balances.

Submitted By: Vishal Hanjan
Date: 11/9/2011

☐ I certify that I have examined this registration and to the best of my knowledge and belief it is true, correct and complete.

Submit   Cancel

5.2   Edit Registration Information

- Click the field in your registration information that you wish to edit. If the field is a dropdown menu, click on the menu to display available values. Select the desired value from the dropdown menu.

Note: *Fields displayed in gray cannot be edited.*

Tip: *For sections with a grid, be sure to click the "Save…" button before continuing.*

▪ After making changes, scroll to the bottom of the screen. Check the checkbox to certify your changes and click the "Submit" button. You will receive a prompt, "Are you sure you want to Amend? Yes/No." Click "Yes" to continue.

▪ This will advance you to the Cash Balances/E-Signatures screen.

5.3 Authorization / Electronic Signature

▪ The logged in officer need only check the checkbox to verify. The remaining officer may enter their system password at this time to e-sign the filing. If the remaining officer is not present, he/she will receive an email asking that they verify the filing.

▪ Click the "Submit" button to save your changes to the system.

▪ After submitting the registration, you will have the opportunity to View/Print the Statement of Organization.

Figure 5.3: AUTHORIZATION

5.4 View/Print Statement of Organization

▪ Once you reach this screen, you have successfully submitted and saved your changes to the system.

▪ This screen is read-only. From this screen, you are able to view and print the Statement of Organization forms that the system has generated for you based on the changes you have made.

▪ Click the View/Print link on the system generated forms to either open the form as a PDF document or save it to a file as a PDF document. Open each form, click the print icon in the upper left corner and print the form.

Figure 5.4 (A): VIEW / PRINT STATEMENT OF ORGANIZATION

Candidate Committee Registration   STEP 1   STEP 2   STEP 3   STEP 4

:: Candidate Committee Registration Complete ::

Print the following Reports	
Statement of Organization	View / Print

Important Note:

1. Your registration is not complete until all the responsible officers provide their e-signature on step 3 of the registration process.

2. Upon activation of your registration, by admin, your Username and password will be sent to the Email address specified in this registration.

3. A confirmation of this process has been Emailed to the address specified in this registration.

Back to Home

6.0   Enter Contributions/Transfers/In-Kind Contributions
This screen allows the committee to enter election campaign contributions, transfers from other Maryland committees and in-kind contributions received.

The Enter Contributions process entails the following overall steps:
- Login to Maryland CRIS with a valid username and password.
- Once logged in as a valid user, click on the "Enter Contributions/Transfers/In-Kind Contributions" link on the left side of the screen.
- All fields marked with "*" are required.

6.1   Entering a Contribution
- On the "Enter Contributions" screen, populate the fields with all of the required information for the contribution you are entering.
- If you have previously entered a contribution for a particular contributor, you may use the "Search Contributor Name" type-ahead search field. As you begin to type the name, the system will automatically return results from which to choose.
- If you are entering a new contributor, the "Search Contributor Name" field will not return any results. Instead, enter the contributor's information below the search field.
   Tip: *Once you have entered a contributor into the system, try using the "Search Contributor Name" field first. If a match is found, the system can accurately calculate the aggregate contribution limits and alert you if a compliance issue exists before you file a report.*

Figure 6.1: Enter Contribution

6.2   Save Contribution
- After you have entered all of the required fields, click the "Submit" button on the bottom of the screen. This submits and saves your contribution into the CRIS and clears all fields on the "Enter Contributions" screen.
   Note: *Your transaction has not been filed to the Maryland State Board of Elections yet. The transaction has been saved in Edit/File Pending Transactions. When all of your contributions for*

this report have been entered and saved using the data entry screens, go to Section 12.0 of this manual and follow the steps provided to file your report.
- You can repeat this process for as many contributions as necessary.
  Note: Contribution Limit and Cumulative Amount are automatically populated by the system, as a read-only display, based on the contributions entered and the contributor selected.

6.3 Clear
- To clear all search results and all fields, click the "Clear" button. This effectively resets the "Enter Contributions/Transfers/In-Kind Contributions" screen.

6.4 Cancel
- To exit the screen without entering any new information into the system, click the "Cancel" button.

6.5 Check Transactions for Compliance
- After you have entered a contribution into the system by clicking the "Submit" button on the bottom of the "Enter Contributions/Transfers/In-Kind Contributions" screen, the system checks the transactions you entered for compliance.
- To review your transactions for compliance, click on the "Edit/File Pending Transactions" link on the left-side menu.
- The "Edit/File Pending Transactions" screen shows all transactions that have been entered and are in "Pending" status. Non-compliant transactions are flagged with a ▼ (red flag) on this page and you can review and edit them from here. Compliant transactions are flagged with a ▼ (green flag).

Figure 6.5: Edit/File Pending Transactions

Edit / File Pending Transactions   Vishal Hanjan (Committee to Elect Vishal Hanjan) ?

Filing Period Name*	01/11/2012 Annual
Transaction Type	--Select Transaction Type--

Transaction Category   -- Select Transaction Category --   Contributor / Payee Name

Transaction Date Range   [ ] - [ ]   Amount Range [ ] - [ ]

☐ Receipt Not Generated   ☐ Loan Consent Form Not Generated   ☐ Non-Compliant Transactions

[Search] [Cancel] [Clear]

Transaction Date	Contributor / Payee Name	Transaction Type	Transaction Category	Amount	Address	Compliance	Edit	☐ Select
			No records to view.					

[File Affidavit (ALCE)] [File Final Report]

Tip: *Anytime you need help with the screen that you are currently on, click the* 🔵 *(question mark) on the top right corner of the screen.*

7.0 Enter Expenditures and Outstanding Obligations

This screen allows a committee to enter election campaign expenditures and outstanding obligations incurred by the committee.

The Enter Expenditures and Outstanding Obligations process entails the following overall steps:
- Login to Maryland CRIS with a valid username and password.
- Once logged in as a valid user, click on the "Enter Expenditures and Outstanding Obligations" link on the left side of the screen.
- All fields marked with "*" are required.

7.1 Enter Expenditure/Outstanding Obligation
- On the "Enter Expenditures and Outstanding Obligations" screen, populate the fields with all of the required information for the expenditure you are entering.
- The "Search Payee Name" field is a type-ahead search. If you have previously entered a particular payee, use this field to search for the payee and auto-populate the required fields.
- If you are entering a new payee, the "Search Payee Name" field will not return any results. Instead, enter the contributor's information below the search field.
- If Vendor is different than the Payee, or the expenditure is a reimbursement, enter the Vendor/Reimbursee Details.
- After you have populated all of the required fields, click the "Add" button. This will save your expenditures into the grid at the bottom of the screen.
  Warning: *If you do not click on the "Add" button below before submitting your expense transaction, you will lose all entered transaction detail and will have to re-enter the information.*
- This process can be completed for as many expenses as necessary.
  Note: *Adding transactions to the grid will not save them into the CRIS. You must click "Submit".*

Figure 7.1 (A): Enter Expenditures and Outstanding Obligations

7.2   Edit/Save Expenditures and Outstanding Obligations

- To modify expense transaction added to the grid, click the 🖉 (edit) button. After you are done editing, click the "Update" button.
- Once you are done editing expenditures for that Payee, click the "Submit" button on the bottom of the screen. This submits your expenditure into the CRIS and clears all fields on the "Enter Expenditures and Outstanding Obligations" screen.
- You can repeat this process for as many expenses as you need to enter.

Figure 7.2: Edit/Save Expenditures and Outstanding Obligations

7.3 Clear
- To clear all search results and all fields, click the "Clear" button. This effectively resets the "Enter Expenditures and Outstanding Obligations" screen.

7.4 Cancel
- To exit the screen without entering any new information into the system, click the "Cancel" button.

7.5 Check Transactions for Compliance
- After you have entered expenses into the system by clicking the "Submit" button on the bottom of the "Enter Expenditures and Outstanding Obligations" screen, the system checks the transactions you entered for compliance.
- To review your transactions for compliance, click on the "Edit/File Pending Transactions" link on the left-side menu.
- The "Edit/File Pending Transactions" screen shows all transactions that have been entered and are in "Pending" status. Non-compliant transactions are flagged with a ⚑ (red flag) on this page and you can edit them from here. Compliant transactions are flagged with a ⚑ (green flag).

   Tip: *Anytime you need help with the screen that you are currently on, click the* ❓ *(question mark) on the top right corner of the screen.*

8.0   Enter Non-Candidate Loans
This screen allows a committee to enter non-candidate loans that have been received from businesses, groups or organizations.

The Enter Non-Candidate Loans process entails the following overall steps:
- Login to Maryland CRIS with a valid username and password.
- Once logged in as a valid user, click on the "Enter Non-Candidate Loans" link on the left side of the screen.
- Fields marked with "*" are required.

8.1   Enter Lender Details
- Enter the required information.

Figure 8.0: Enter Non-Candidate Loans

8.2   Edit/Save a Loan

- To modify loan transaction added to the grid, click the [edit icon] (edit) button. After you are done editing, click the "Save" button.
- Once you are done editing loan for that Lender, click the "Submit" button on the bottom of the screen. This submits your loan into the CRIS and clears all fields on the "Enter Non-Candidate Loans" screen.
- You can repeat this process for as many loans as necessary.

Figure 8.4: Edit/Save a Loan

8.3   Clear
▪ To clear all search results and all fields, click the "Clear" button. This effectively resets the "Enter Non-Candidate Loans" screen.

8.4   Cancel
▪ To exit the "Enter Non-Candidate Loans" screen without entering any new information into the system, click the "Cancel" button.

8.5   Check Transactions for Compliance
▪ After you have entered loans into the system by clicking the "Submit" button on the bottom of the "Enter Non-Candidate Loans" screen, the system checks the information you entered for errors.
▪ To see if the system has found any errors, click on the "Edit/File Pending Transactions" link on the left-side menu.
▪ The "Edit/File Pending Transactions" screen shows all transactions that have been entered and are in "Pending" status. Errors will be flagged with a 🚩 (red flag) on this page and you can edit them from here. Transactions without errors are marked with a ✅ (green flag).

Tip: Anytime you need help with the screen that you are currently on, click the ❓ (question mark) on the top right corner of the screen.

9.0 Enter Return Contributions
This screen allows a committee to return entire or partial contributions received.

The Enter Return Contributions process entails the following overall steps:
▪ Login to Maryland CRIS with a valid username and password.
▪ Once logged in as a valid user, click on the "Enter Return Contributions" link on the left side of the screen.
▪ Fields marked with "*" are required.

10.1 Search for Contributions
▪ Populate the fields you would like to search within and click "Search". The results will include only those transactions that meet the search criteria you entered in the search fields. They will be listed below the search fields.
Note: *You may narrow your search by selecting additional criteria.*
▪ To clear all search results and all fields, click the "Clear" button. This effectively resets the "Enter Return Contributions" screen.

Figure 10.1: Search For Contributions
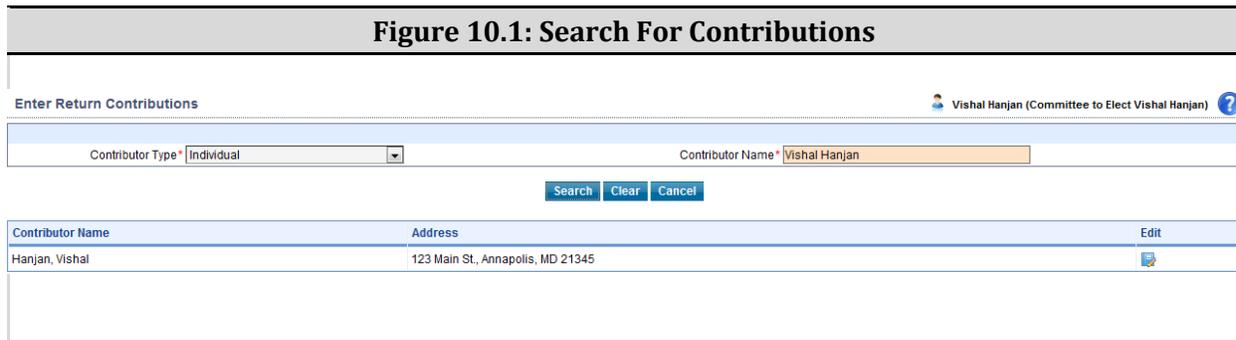
10.2 Enter Returns

▪ To open Contribution Details, click the 📝 icon that is on the line containing the Contribution in the grid. Contribution Details are auto populated.
▪ Populate required return information for the transaction.

Figure 10.2: Enter Returns

10.3 Save Return Contributions

- After you have populated all of the required fields, and any others you want to fill out, click the "Submit" button on the bottom of the screen. This submits and saves your return contributions into the Maryland CRIS and clears all fields on the "Enter Return Contributions" screen.
  Note: Your transaction has not been filed to the Maryland State Board of Elections yet. The transaction has been saved in Edit/File Pending Transactions. When all of your return contributions for this report have been entered and saved using the data entry screens, go to Section 12.0 of this manual and follow the steps provided to file your report with the State Board of Elections.
- You can repeat this process for as many return contributions as necessary.

Figure 10.3: Save Return Contributions

10.4 View Past Payments

- To view past returns on the contribution, click the "+" (plus sign) icon on the individual contribution.
- To close the past return details for the contribution and only display the contribution information on a single line, click the "-" (minus sign).

10.5 Edit/Delete Returns

- Open Contribution Details and click the ☑ icon that is on the line containing the Contribution in the grid. Contribution Details are auto populated.
- Click the "+" (plus sign) icon on the individual contribution to view past returns for the contribution. This will open the past return details for that contribution.

- Click the ![icon] icon that is on the line containing the return, make necessary modifications and click the ![icon] icon to the right of the "Return Amount" field to save the changes to the grid.
- To delete the transaction, click the ![icon] icon that is on the line containing the past payment.

Figure 10.5: Edit/Delete Returns

10.6 Clear
- To clear all search results and all fields, click the "Clear" button. This effectively resets the "Enter Return Contributions" screen.

10.7 Cancel
- To exit the screen without entering any new information into the system, click the "Cancel" button.

10.8 Check Transactions for Compliance
- After you have entered returned contributions into the system by clicking the "Submit" button on the bottom of the "Enter Return Contributions" screen, the system checks the information you entered for errors.
- To see if the system has found any errors, click on the "Edit/File Pending Transactions" link on the left-side menu.
- The "Edit/File Pending Transactions" screen shows all transactions that have been entered and are in "Pending" status. Errors will be flagged with a ![flag] (red flag) on this page and you can edit them from here. Transactions without errors are marked with a ![flag] (green flag).

Tip: *Anytime you need help with the screen that you are currently on, click the ![icon] (question mark) on the top right corner of the screen.*

10.0 Enter Obligations Paid
This screen allows a committee to enter payments towards outstanding obligations.

The Enter Obligations Paid process entails the following overall steps:
▪ Login to Maryland CRIS with a valid username and password.
▪ Once logged in as a valid user, click on the "Enter Obligations Paid" link on the left side of the screen.
▪ Fields marked with "*" are required.

11.1 Search for Outstanding Obligations
▪ Click "Search" to display all outstanding obligations for the filing period selected by default. The results will include all outstanding obligations and will be listed in the grid below.
   Note: You may narrow your search by selecting/entering additional criteria.
▪ To clear all search results and all fields, click the "Clear" button.

Figure 11.1: Search For Outstanding Obligations

Enter Outstanding Obligations Paid			Vishal Hanjan (Committee to Elect Vishal Hanjan)

Filing Period Name (Obligation Origination)	01/11/2012 Annual	Payee Name	
Incurred Date		Amount Incurred	

Search   Clear   Cancel

Payee Name	Address	Vendor Name	Outstanding Balance	Select
PCC Technology Group, LLC	2 Barnard Ln,,Bloomfield,Maryland,21345 -		$200.00	

11.2 Enter Payments

▪ To open an Outstanding Obligation, click the [icon] icon for the record in the grid.
▪ Enter Payment Date and Payment Amount.

Figure 11.2: Enter Payments

Enter Outstanding Obligations Paid		Vishal Hanjan (Committee to Elect Vishal Hanjan)

Filing Period Name	01/11/2012 Annual	Payee Name	

	Expenditure Date	Vendor Name	Original Amount	Balance Amount	Payment Date	Payment Amount
	11/07/2011		$200.00	$190.00		

Submit   Cancel   Clear

11.3 Save Payments
▪ After you have populated the required fields, click the "Submit" button on the bottom of the screen. This saves your payments towards the outstanding obligation into CRIS and clears all fields on the "Enter Obligations Paid" screen.
   Note: *At this point, the saved transaction has not been filed to Maryland SBE. The transaction has been saved in Edit/File Pending Transactions. If you wish to file a campaign finance report, go to Section 12.0 of this manual and follow the steps provided to file your report with the Maryland State Board of Elections.*
▪ This process can be repeated for as many obligations and payments as needed.

Figure 11.3: Save Payments

11.4 View Past Payments

- To view past payments on an expenditure, click the ⊞ icon on the individual contribution.
- To close the past payment details for the expenditure and only display the expenditure information on a single line, click the ⊟ icon.

11.5 Edit/Delete Outstanding Obligation Paid

- Open Outstanding Obligations Payment Details and click the 📝 icon for the outstanding obligation that contains the payment that is to be edited or deleted.
- Click the ⊞ icon on the record that contains the payment to be edited or deleted. This will open the past payment details for that outstanding obligation.
- Click the 📝 icon that corresponds to the payment you wish to edit. Make necessary modifications and click the "Update" button to save the changes to the grid.
- To close the transaction in edit mode without saving changes, click the "Cancel" button.
- To delete the payment, click the 🗑 icon that corresponds to the past payment.

Figure 11.4: Edit Outstanding Obligation Paid

11.6 Clear

- ▪ To clear all search results and all fields, click the "Clear" button. This effectively resets the "Enter Obligations Paid" screen.

11.7 Cancel

- ▪ To exit the screen without entering any new information into the system, click the "Cancel" button.

Tip: *Anytime you need help with the screen that you are currently on, click the* ❓ *(question mark) on the top right corner of the screen.*

11.0 Edit/File Pending Transactions

This screen allows a committee to review, edit, delete, or file to the Maryland State Board of Elections pending Contributions, Expenditures and Outstanding Obligations, Loans, Return Contributions, Outstanding Obligation Payments and Non-Candidate Loan Payments that have been entered into the system. The committee can also verify that all transactions are considered compliant. If a transaction is non-compliant, the committee will be provided with a reason for the non-compliance and have the ability to rectify it. Receipts to contributors and Loan Consent Forms can also be generated.

The Edit / File Pending Transactions process entails the following overall steps:
- Login to Maryland CRIS with a valid username and password.
- Once logged in as a valid user, click on the "Edit/File Pending Transactions" link on the left side of the screen.
- Fields marked with "*" are required to initiate search.

12.1 Search for Pending Transactions
- Click "Search" to display all outstanding obligations for the filing period selected by default. The results will include all outstanding obligations and will be listed in the grid below.
   Note: *You may narrow your search by selecting/entering additional criteria.*
- To clear all search results and all fields, click the "Clear" button. This effectively resets the Edit/File Pending Transactions screen.

Figure 12.1: Search For Pending Transactions

12.2 Save Search Results
- The results of your search can be saved as a PDF, Microsoft Word, Microsoft Excel and/or Microsoft Excel Comma Separated Values document.
- To save your search results as a Microsoft Word document, click the icon.
- To save your search results as a Microsoft Excel document, click the icon.
- To save your search results as a Microsoft Excel Comma Separated Values document, click the icon.
- To save your search results as a PDF, click the icon.
- Clicking any of the icons above will open a dialogue box that gives you the option to open the document for viewing and/or saving or the option to save the document directly to your computer or external device.
  o To open the document, click the "Open" button. If it a Microsoft document, it will open the search results using the appropriate Microsoft product on your computer in the format that you selected. This document can be saved just as any other Microsoft document can.
  o If the PDF format is selected, the PDF can be saved to your computer but a PDF viewer such as Adobe is required to open and view the file.
  o To save the document without opening it, click the "Save" button. This will open the "Save As" dialogue box and allow you to save the document directly to your computer or external device.
  o If you choose not to view or save the document, click "Cancel" in the dialogue box. This will close the dialogue box and return you to the search results screen.

12.3 Edit Pending Transactions
- Locate the transaction you want to edit from the list of search results. A limited number of search results are displayed on one screen, so there may be multiple pages of search results. Check the top and bottom of your search results for links that say "Next Page" and page numbers "1, 2, 3, etc..." If you see these, then your search results fill more than one screen. To see more search results, you will need to click either the "Next Page" link or the page number of the page you would like to be displayed.
- If you do not see the transaction you are looking for, modify your search criteria and search again.
- When you have located the transaction you want to edit, click on the icon in the line that contains the transaction you want to edit. This will open the transaction, and all of its fields, on your screen. You are allowed to edit any of the accessible fields of this transaction.
- Opening a transaction to edit it does not clear your search results. They will still be visible after you have finished on the "Edit" screen and returned to the search screen.
- If a field is grayed out, you are not allowed to edit it. You are not able to activate these grayed out fields by clicking on them.
- To make changes to an accessible field (those that are not grayed out), click the field to activate it and make changes.
- After you have made all changes to all fields that you want to change, click the "Submit" button on the bottom of the screen. This will enter the changes you made into the system and return you to your search results.
- If, while on the "Edit" screen, you want to return to your search results without saving any of the changes you have made into the system, click the "Cancel" button. This will return you to your search results but will not save any changes that you made on the previous edit screen.

Figure 12.3: Edit Pending Transactions

12.4 Delete Transactions
- To delete a particular transaction or multiple transactions, place a ✓ in the "Select" column to the right of the transaction details in the grid results display, then click on the "Delete" button located below the displayed grid results.
- To delete all transactions, click the "Delete All" button.
  Warning: Deleting all transactions removes them from the system permanently.

12.5 Generate Receipt
- To generate a receipt for a contribution, select the contribution(s) from the grid by clicking the corresponding checkbox.
- Click the "Generate Receipt" button.
- Receipts are generated for the selected transaction(s) in a PDF format.
  Tip: Need to generate a large number of receipts? Select all transactions by clicking the checkbox in the "Select" column header and click "Generate Receipt". The system will automatically generate receipts for just the contributions and not the expenditures.

12.6 Generate Loan Consent Form
- Select a Non-Candidate Loan for which a Loan Consent Form (LCF) is to be generated.
- Click "Generate Loan Consent Form"
  Tip: Instead of mailing the LCF, upload it to SBE by going to View/Edit Registration and clicking the "Add Document" button in the Documents/Correspondence section.

12.7 Preview Filing
- To preview your campaign finance statement for accuracy, click the "Preview Filing" button. This will result in the campaign finance statement being generated as it appears following an actual filing.
- After the "Preview Filing" button has been clicked, a dialogue box will open that shows the report generated with a link labeled "View/Print."
- To view or print the report, click on the "View/Print" link. This will open a dialogue box that gives you the option to "Open," "Save," or "Cancel."
- If you click "Open," the report will open on as a separate PDF document. You are able to view, save and print this document as you can any other.
  Tip: Make sure you have a PDF viewer such as Adobe installed on your computer.
- If you click "Save", the "Save As" box will open and you are then able to save the document, without viewing it first, to your computer or to an external drive.
- To close the Open/Save/Cancel dialogue box, click the "Cancel" button. This will close the current dialogue box and return you to the page that lists the report that was generated.

12.8 File All To State
- To file all of the transactions in your search results to the Maryland State Board of Elections, click the "File All To State" button. This will result in a dialogue box that shows the filing period your transactions are in and has the following required fields:
  o Start Date (the beginning of the filing period)
  o Reported Beginning Bank Balance (the balance at the beginning of the filing period)
  o Bank Account Balance (the balance at the end of the filing period)
  o Reported Ending Bank Balance (automatically generated sum of bank balances)
- To complete your filing, you must e-sign. If the logged in user is an officer (Chairperson or Treasurer), then they must check the checkbox to confirm the information is correct. The remaining officer may enter their password at this time. If the remaining officer is not available to enter their password, the system will accept the filing and send an email asking the officer to verify/e-sign the filing.
  Tip: An officer who has not signed will be able to do so from their Reminders screen under "My Verifications" section when they log into the system.
  Warning: Failure to obtain all necessary e-signatures may result in a violation for failure to file.

Figure 12.7: File All to State

12.9 Clear
- To clear all search results and all fields, click the "Clear" button. This effectively resets the "Cash Balances" screen.

12.10 Cancel
- To cancel the filing and return to your search results, before you have clicked "Submit", click "Cancel" in the dialogue box. Your transactions will not be filed to the State, and you will be returned to your search results.

12.11 View/Print Campaign Statement
- After your transactions have been filed to the State Board of Elections, the appropriate campaign statement will be generated.
- To view or print the report, click on the "View/Print" link. This will open a dialogue box that gives you the option to "Open," "Save," or "Cancel."
- If you click "Open," the report will open on as a separate PDF document. You are able to view, save and print this document as you can any other.
- If you click "Save", the "Save As" box will open and you are then able to save the document, without viewing it first, to your computer or to an external.
- To close the Open/Save/Cancel dialogue box, click the "Cancel" button. This will close the current dialogue box.
  Note: *Committee officers will receive an email to alert them that the campaign finance report has been received.*

Figure 12.10: View/Print Campaign Statement

12.12 File Affidavit (ALCE)
- If the committee meets the criteria to file an Affidavit of Limited Contributions and Expenditures, they may do so from this screen.

12.13 File Final Report
- If you wish to close your committee and meet the requirements to do so, this can be accomplished by submitting a final campaign statement to SBE.
- To continue with your final report, click "OK" when asked if you want to proceed. After you have done this, you will be required to enter the cash balances as any other filing.
- Enter the appropriate e-signatures and click "Submit." This will file all pending transactions, generate the campaign statement, flag the request to close the committee and post a reminder for the SBE Administrator.

12.0 Amend Filed Transactions

This screen allows a committee to amend transactions that have already been filed to the Maryland State Board of Elections. The committee can also add new transactions from this screen.

The Amend Filed Transactions process entails the following overall steps:
- Login to Maryland CRIS with a valid username and password.
- Once logged in as a valid user, click on the "Amend Filed Transactions" link on the left side of the screen.
- Fields marked with "*" are required.

13.1 Search for Filed Transactions
- After you have logged in as a Committee, click on the "Amend Transactions" link on the main menu.
- Any, and all, of the fields can be used to search for filed transactions. Filing Period Name is required.
- Populate the fields you would like to search within and click "Search." The results will include only those transactions that meet the search criteria you entered in the search fields. They will be listed in the grid below the search fields.
- To clear all search results and all fields, click the "Clear" button. This effectively resets the "Amend Transactions" screen.

Figure 13.1: Search For Filed Transactions

13.2 Saving Search Results
- The results of your search can be saved as a Microsoft Word, Microsoft Excel and/or Microsoft Excel Comma Separated Values document.
- To save your search results as a Microsoft Word document, click the [icon] icon.
- To save your search results as a Microsoft Excel document, click the [icon] icon.
- To save your search results as a Microsoft Excel Comma Separated Values document, click the [icon] icon.
- To save your search results as a PDF, click the [icon] icon.

- Clicking any of the icons above will open a dialogue box that gives you the option to open the document for viewing and/or saving or the option to save the document directly to your computer or external device.
  - o To open the document, click the "Open" button. If it a Microsoft document, it will open the search results using the appropriate Microsoft product on your computer in the format that you selected. This document can be saved just as any other Microsoft document can.
  - o If the PDF format is selected, the PDF can be saved to your computer but a PDF viewer such as Adobe is required to open and view the file.
  - o To save the document without opening it, click the "Save" button. This will open the "Save As" dialogue box and allow you to save the document directly to your computer or external device.
    - o If you choose not to view or save the document, click "Cancel" in the dialogue box. This will close the dialogue box and return you to the search results screen.

13.3 Amend a Filed Transaction

- Locate the transaction you want to amend from the list of search results. A limited number of search results are displayed on one screen, so there may be multiple pages of search results. Check the top and bottom of your search results for links that say "Next Page" and page numbers "1, 2, 3, etc..." If you see these, then your search results fill more than one screen. To see more search results, you will need to click either the "Next Page" link or the page number of the page you would like to be displayed.
- If you do not see the transaction you are looking for, modify your search criteria and search again.
- When you have located the transaction you want to edit, click on the 📝 icon in the line that contains the transaction you want to amend. This will open the transaction, and all of its fields, on your screen. You are allowed to edit any of the accessible fields of this transaction.
- Opening a transaction to edit it does not clear your search results. They will still be visible after you have finished on the "Edit" screen and returned to the search screen.
- If a field is grayed out, you are not allowed to edit it. You are not able to activate these grayed out fields by clicking on them.
- To make changes to an accessible field (those that are not grayed out), click the field to activate it and make changes.
- After you have made all changes to all fields that you want to change, click the "Submit" button on the bottom of the screen. This will enter the changes you made into the system and return you to your search results.
- If, while on the "Edit" screen, you want to return to your search results without saving any of the changes you have made into the system, click the "Cancel" button. This will return you to your search results but will not save any changes that you made on the previous edit screen.

Figure 13.3: Amend a Filed Transaction

13.4 Entering New Transactions from this screen

- The following new transactions can be entered from this screen:
  - Contribution
  - Expenditure and Outstanding Obligation
  - Outstanding Obligation Paid
  - Non-Candidate Loan
  - Non-Candidate Loan Payment
  - Return Contribution

- To add one of these transactions, click the button at the bottom of the screen that says, "Add New [transaction type]" This will open a screen that is titled "Amend [selected transaction]." All of the fields on this screen will be empty, and you are then able to enter the new transaction in them.
- On this new "Amend" screen, fill in all of the required "*" fields.
- After you have populated all of the required fields, click the "Submit" button on the bottom of the screen. This will enter the new transaction into the system and return you to the search results screen.
- If, at any point before you click "Submit", you want to cancel the new transaction without entering it into the system, click the "Cancel" button on the bottom of the screen. This will return you to the search results screen but will NOT enter the new transaction into the system.

13.5 Preview Filing

- To preview a campaign statement for the committee, click the "Preview Filing" button. This will result in the PDF report being generated.

- After the "Preview Filing" button has been clicked, a screen will open that shows a link labeled "View/Print."
- To view or print the report, click on the "View/Print" link. This will open a dialogue box that gives you the option to "Open," "Save," or "Cancel."
- If you click "Open," the report will open on as a separate PDF document. You are able to view, save and print this document as you can any other.
- If you click "Save", the "Save As" box will open and you are then able to save the document, without viewing it first, to your computer or to an external drive or disk just as you are able to do with any other file.
- To close the Open/Save/Cancel dialogue box, click the "Cancel" button. This will close the current dialogue box and return you to the dialogue box that lists the report that was generated.

13.6 File Amendment to State

- When all of the transactions are ready to be filed to the State, click the "File All to State" button. This will result in a dialogue box in which the period name for each period for which you a filing a transaction will be displayed. For each period name you are required to enter Start Date, Reported Beginning Bank Balance and individual Bank Balances.
- You are also required to e-sign the report.
- After you have entered all of the required information in this dialogue box, click the "Submit" button. This will file all of the amended and new transactions to the State Board of Elections.

Figure 13.6 (A): File Amendment to State

Figure 13.6 (B): View/Print Campaign Statement

13.7 Clear
- To clear all search results and all fields, click the "Clear" button. This effectively resets the "Authorization" screen.

13.8 Cancel
- To NOT file the transactions to the State Board of Elections, and to return to the search results screen, click the "Cancel" button.

13.9 Delete Transactions
- To delete a transaction, click the checkbox under the column heading "Select" for the file you want to delete.
- After you have checked the checkbox for all of the transactions you want to delete, click the "Delete" button on the bottom of the page. This will delete the selected transactions from the system.
- You are allowed to delete any, or all, of the transactions you have amended or added.

13.10 Cancel
- To exit the "Amend Transactions" screen and return to the Committee Main Menu, click the "Cancel" button.

13.0 Upload Transactions

This screen allows a Committee to upload his or her transactions to the system.

The Upload Transactions process entails the following overall steps:
- Login to Maryland CRIS with a valid username and password.
- Once logged in as a valid user, click on the "Upload Transactions" link on the left side of the screen.
- Fields marked with "*" are required.

Note: Only Microsoft Excel files are allowed to be uploaded. Although these files can be manually created using an Excel spreadsheet, it is strongly recommended that the desired template be downloaded from this screen.

14.1 Upload a Saved File

Important Note: *If you receive an error message while attempting to upload or process a template, corrections must be made on the ORIGINAL FILE, then it must be uploaded again. The file you have uploaded that resulted in errors should be used only as a reference for making corrections. Open the original file from the location where it is saved, make the necessary corrections to it and then upload it again.*

- To upload an Excel file that is saved on your computer, click on the "Browse" button, next to the "Select a File" field, on the far right-hand side of the Upload File section. This will open a "Choose File" box from which you are able to locate the saved Excel file.
- From this "Choose File" box, locate the saved Excel file you want to upload and then click "Open." This will result in the file location being populated into the "Select a File" field.
- Before you can upload a file, a value must be selected from the Filing Period Name drop-down menu and from the Transaction Type drop-down menu. These values must agree with the information on the Excel file you are attempting to upload. This can be done at any point before you click the "Upload" button. After you have populated both of these fields, and you have selected an Excel file to upload and that file location appears in the "Select a File" field, click the "Upload" button.
- A successful upload will result in a message stating, "File Uploaded Successfully," and the file appearing in the "Upload Status" section with a Status of "Uploaded."
- If the file was not uploaded successfully, a message stating, "Invalid Template: XXX," with a description of the error where the three X's appear, will be displayed. The file will not appear in the "Upload Status" section if it was not successfully uploaded.
- These, "Invalid Template," errors result from a problem with the overall file itself not from errors with data in the file. An example of this type of error is attempting to upload a Contributions template when the Transaction Type selected is "Expenditures." Another common mistake is not having the correct column headings in the file you are attempting to upload. If these errors occur, you must go back to the ORIGINAL file to make changes (see Note at the beginning of this section).
  Note: *The templates provided on the Upload Transactions page can be used as a reference for the appropriate column headings.*
- After a file has been successfully uploaded, it now must be checked for errors. To do this, click the "Check Status" button. This will result in the Status of this file changing to either "Processed – No Errors," in green lettering, or to "Processed – With Errors," in red lettering. You are allowed to upload any number of files before you click "Check Status." This way you can check the statuses of multiple uploads at once instead of checking them one at a time.
- If, after clicking "Check Status," the file you uploaded has a Status of "Processed – No Errors," in green lettering, the file is okay. You do not need to make any changes to it.

- If, after clicking "Check Status," the file you uploaded has a Status of "Processed – Errors," in red lettering, there are errors on the uploaded file that need to be corrected. These kinds of errors result from incorrect data IN the file, not from the file itself. Examples of this kind of error are "Invalid Contribution Date" or "Invalid Contribution Type."
- To see what errors need to be corrected, click on the File Name of the uploaded file that contains the errors. This is in blue lettering in the Upload Status section. Clicking on this will result in a File Download prompt. Click "Open" in this prompt to open the Excel document. Column W, "Errors," lists the errors that caused the system to label it with a Status of "Processed – Errors." To correct these errors, open the original file from the location where it is saved, make the changes, and upload it again (see Important Note at the top of this section).
- The goal in uploading a transaction is to have a successful upload and for this upload be labeled with a Status of "Processed – No Errors." Errors need to be checked and corrected until this is achieved. Corrections can only be made to the original file, and this file must then be uploaded again (see Important Note at the top of this section)

Figure 14.1: Upload A Saved File


14.2 Upload Using a Template

- To manually create an Excel spreadsheet for recording transactions such as Contributions and Expenditures, use this method.
- Excel templates are available to be downloaded separately for Contributions and Expenditures. The links to download them are in brown letters near the top of the Upload Transactions screen in the section labeled "Download Templates."
- To download a template, click on desired version of Microsoft Excel ("2003 and earlier" or "2007 and later") of "Contributions," or "Expenditures" link in the "Download Templates" section. This will open a File Download dialogue box that allows you to open the Excel template or save it directly to an available location.
- To open the Excel template, click the "Open" button in this dialogue box. This will open the template as a separate screen and allow you to edit and save it. Note that if you open the template directly, you must save it before you can upload it to the system.
- To save the template directly from this dialogue box, click the "Save" button in this dialogue box. This will open the "Save As" box and allow you to save the template to any available location.

- After you have saved a template, you are able to upload it to the system by following the steps in the previous "Upload a Saved File" section.

14.3 Other Templates

- There are additional Excel templates that are provided for you on the Upload Transactions screen. There is a link to each of them in brown lettering near the bottom of the page.
- To use one of these templates, click on the link of the template you want. This will open a File Download box from which you can open or save the file.
- To open the template directly, click "Open" in the File Download box. If you choose to open the template this way, be sure to save the file before closing it or it will be lost.
- To save the template without opening it, click "Save" in the File Download box. This will open a Save As box and allow you to save the file to any available location.
- To exit the File Download box without opening or saving a template, click "Cancel."

Figure 14.3: Other Templates

Other downloads

Ballot Proposal Ids   Committee Ids
Fund Raiser Events   Expenditure Type Codes
Expenditure Sub Category
Contribution Sub Category
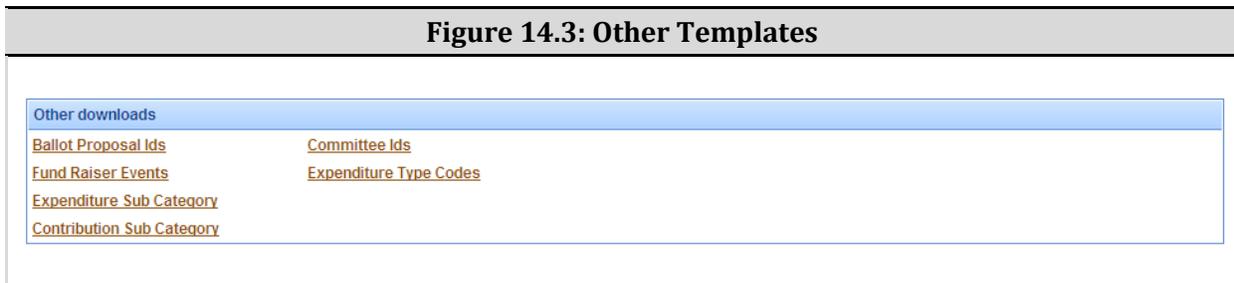
14.4 Clear

- To clear all search results and all fields, click the "Clear" button. This effectively resets the "Upload Transactions" screen.

14.0 Change Username/Password

This screen allows a Committee to change the password that is used to login to the Committee section of the system.

The Change Password process entails the following overall steps:
- Login to Maryland CRIS with a valid username and password.
- Once logged in as a valid user, click on the "Change Password" link on the left side of the screen.
- Fields marked with "*" are required.

16.1 Changing your current Password
- The screen will display your Committee Name and show three required open fields.
- In the "Enter your Current Password" field, enter the password you used to login to the website.
- In the "Choose a New Password" AND "Confirm your New Password" fields, enter a new password of your choice. Enter the SAME PASSWORD in both of these fields.
- After you have populated the three required fields, and your new password meets the requirements (see section 18.2), click the "Submit" button.
- If your new password is accepted, you will receive a dialogue box that states, "You have successfully chosen a new password."
- If your new password is not accepted, a dialogue box will be displayed that states the reason why the password was not changed. Click "OK" in this dialogue box, and enter a new password that meets the requirements listed below.

Figure 18.1: Change Username/Password

16.2 Password Requirements
- Passwords are case sensitive. This means an upper case letter MUST be capitalized and a lower case letter MUST be lower case in order for the password to be accepted.
- Passwords must have at least 6 characters but not more than 10 characters.
- At least three of the following four character types must be included in your password:
  o Lower Case
  o Upper Case
  o Number

  o Special Character (e.g., a symbol or punctuation mark)

16.3 Cancel

- To leave the Change Password screen and return to the main menu, click the "Cancel" button. If this is done before a new password has been both submitted and accepted, your password has not been changed.